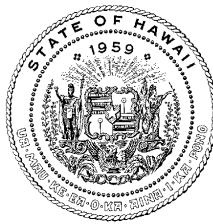




REQUEST FOR QUALIFICATIONS

For UPDATE OF THE HAWAII TOURISM PROUDUCT ASSESSMENT

RFQ-03-01-HTA



**Hawaii Tourism Authority
State of Hawaii
1801 Kalakaua Avenue
Hawaii Convention Center, First Level
Honolulu, Hawaii 96815**

Date of Issuance: May 12, 2003

Contact Person:
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(808) 973-2260

**DEADLINE FOR SUBMITTING QUALIFICATION
STATEMENT IS MAY 23, 2003 at 4:30 p.m.**
(Facsimile or electronic transmission will not be accepted.)

**REQUEST FOR QUALIFICATIONS
HAWAII TOURISM AUTHORITY
RFQ NO. 03-01-HTA**

1.0 Introduction

Hawaii Revised Statutes sections 201B-3 (a) (14) and (16) requires the Hawaii Tourism Authority (“HTA”) to “[c]reate a vision and develop a long range plan for tourism in Hawaii,” and to “[d]evelop and implement the state tourism strategic marketing plan, which shall be updated every three years, to promote and market the State as a desirable leisure and business visitor destination.” Pursuant to this statutory requirement, the HTA adopted a tourism strategic plan that was implemented through a plan entitled “Ke Kumu: Strategic Directions for Hawaii’s Visitor Industry” (“Ke Kumu”).

Ke Kumu was adopted in June 1999 and based upon two foundation studies presented to the HTA in 1999. One of the foundation studies was an assessment of the tourism product Hawaii has to offer its visitors and entitled “Hawaii Tourism Product Assessment.” The other foundation study was an evaluation of Hawaii’s visitor industry relative to its current and potential competition, and entitled “Competitive Strategic Assessment of Hawaii Tourism.” Ke Kumu was subsequently revised on January 30, 2002. (Ke Kumu may be viewed from a link on HTA’s website at www.state.hi.us/tourism.) An update of Ke Kumu is statutorily required to be completed by January 30, 2005.

An integral part of the process to update Ke Kumu is to update the foundation studies by conducting a current assessment of Hawaii’s tourism product and a current evaluation of Hawaii’s visitor industry relative to its competition in various geographic and non-geographic areas, such as the convention center meeting market; the corporate meeting and incentive meeting market; and, the airline and cruise ship market.

Recent global, national, and local conditions have undergone dramatic changes since the initial foundation studies were presented to the HTA as a basis for developing Ke Kumu. Specifically, the terrorist attacks on September 11 and other recent world events, such as the Iraq war, may give cause to make significant revisions to Ke Kumu.

The HTA intends to rely upon an update of the foundation studies to determine whether and how Ke Kumu should be revised. In order to timely update Ke Kumu before the statutory deadline of January 30, 2005, an update of the foundation studies must be completed by December 31, 2003. Upon completion of the updated foundation studies, the HTA intends to present its findings and conclusions to the Governor and Legislature prior to the 2004 legislative session. HTA will also begin the deliberative process to revise Ke Kumu after taking into account the findings of the updated foundation studies and the Sustainable Tourism Study currently being conducted by the Department of Business, Economic Development & Tourism. Public testimonies will also be widely solicited on any draft revisions to Ke Kumu and prior to final adoption by the HTA board.

The HTA is statutorily exempt from the competitive bidding requirements provided under the Hawaii Public Procurement Code, chapter 103D, HRS. The HTA will be soliciting contractors to conduct three foundation studies by requesting statements of qualifications. The HTA will contract with one or more contractors, who are best qualified and able to complete the foundation studies in a timely, efficient, and cost effective manner.

This Request for Qualifications No. 03-01-HTA (“RFQ”) is for a project related to conducting an update, analysis, and evaluation of Hawaii’s tourism product offerings.

2.0 Selection Process

- 2.1 Responding firms shall submit a Statement of Qualifications that will be scored in accordance with the evaluation criteria outlined in Section 7.0, Statement Evaluation Criteria. The HTA staff will rank the firms by order of preference and seek to negotiate satisfactory contractual arrangements with the first firm. Failing to do so, the next firm will be approached.
- 2.2 HTA reserves the right to request additional information or clarify submitted information. HTA further reserves the right to reject any and all submissions and to waive any aspect of this process
- 2.3 This RFQ does not commit the HTA to award a contract, to pay costs incurred for the preparation of any statements of qualifications, or to procure or contract for goods or services.

3.0 Statement of Goals and Objectives

3.1 Project Goals

It is the expectation of the HTA that upon completion of this project, it will have sufficient valid and reliable information upon which it can determine whether and how Ke Kumu may be revised or updated.

3.2 Project Objective

- 3.2.1 Update the foundation studies relied upon by the HTA to develop the various strategic initiatives in Ke Kumu, specifically the foundation study that assessed the tourism product Hawaii has to offer it visitors and entitled “Hawaii Tourism Product Assessment.”
- 3.2.2 Review, evaluate, and identify current factors and trends, including economic, social, or other matters affecting visitor travel throughout the world and specifically Hawaii.
- 3.2.3 Identify, evaluate, and assess the current tourism product being offered in Hawaii, including community-based tourism events, experiences,

attractions, projects, and programs that complement Hawaii's traditional resort product and assist in overall economic diversification.

4.0 Scope of Work

The qualified contractor will be required to provide services, including, but not limited to, the following:

- 4.1 Gather and review existing reports, studies, and other related documents from state, county, federal, and private sources as appropriate and available related to Hawaii's tourism product offerings, including, but not limited to, Ke Kumu and the two foundation studies previously discussed in Section 1.0, Introduction.
- 4.2 Determine need for additional information; develop appropriate instruments and methodology to obtain any additional information; and, design a program to ensure statistically significant, valid, and reliable data related to Hawaii's tourism product. (See Attachment 1 for information that must be updated by topic area. This chart follows the format of the current foundation study entitled "Hawaii Tourism Product Assessment.")
- 4.3 Based on methodology developed under Section 4.2, conduct an update, analysis and evaluation of Hawaii's product offerings including physical and experiential elements.
- 4.4 Analyze and report on data gathered.
- 4.5 All services shall begin upon execution of a contract and contemplated to be on or about June 30, 2003. Services shall be completed by October 15, 2003. Suggested revisions to this time line may be considered by HTA.
- 4.6 Funds available for this project have tentatively been budgeted for an amount not to exceed \$50,000.00, pending final approval from the required government entities and subject to the availability of funds.

5.0 Schedule of Key Dates

- 5.1 Statement of Qualifications shall be submitted to the HTA by 4:30 p.m., Friday, May 23, 2003.
- 5.2 Statements of Qualifications shall be evaluated by June 6, 2003.
- 5.3 Final contract executed with selected contractor no later than June 30, 2003.
- 5.4 All services shall begin upon execution of the contract.
- 5.5 Final update of the foundation study shall be completed by October 15, 2003.

- 5.6 Contractor's Final Report evaluating the work performed under the contract shall be completed by December 31, 2003.

6.0 Statement of Qualification

All Statements of Qualifications shall comply with the format described below. The Statements are to be prepared at the firm's expense and submitted to meet the requirements of this RFQ. The Statement of Qualification ("Statement") will be considered an example of the firm's work product. Submission of information that was not requested will not improve a firm's ranking and may be evaluated as evidence that the firm's analysis and presentation of information is not focused.

- 6.1 **Introductory letter:** The introductory letter will include the name of the firm or person that will provide the work; a comprehensive background history of the establishment, development, and accomplishments of the firm; the business headquarters and locations of all offices; the firm's number of years in business; the number of years providing services relevant to the scope of work for this project; the names and phone numbers of up to five clients who could be contacted for reference; and, any promotional or descriptive literature about the firm.
- 6.2 **Qualifications and Expertise:** This section is intended to be the heart of the Statement. A thorough accounting of the various expertise and personnel qualifications relevant to this project should be included in the Statement. The Statement should include the professional qualifications of the firm, including information on any licensed or certified key professional personnel working on the project. The resumes of key personnel working on the project should be included and must describe the education, training, and qualifications relevant to the scope of work for this project. Familiarity with Hawaii's tourism product must also be described. Qualifications and expertise will be evaluated on the suitability for the work required. The firm's experience with other projects similar to this project is a significant factor that will be evaluated and must be detailed in the Statement.
- 6.3 **Project Team:** If relevant, the team designated by the firm to work on this project should be described, including the Principal that would be managing the project; the resumes of the team members as well as other key firm members who would be working on this project; how long the team members have been working together; and, a list of similar projects the members of this team have worked on and completed. The office in which each team member is located should be indicated.
- 6.4 **Project Understanding, Approach, and Work Plan:** This section reflects the firm's knowledge and experience with the methods necessary to complete the project scope of work in a manner that will allow the HTA to achieve its

expectations, goals, and objectives for this project. This section should include a work plan that will demonstrate the firm's clear and specific understanding of the specifications for this project. The work plan should also include a time line.

7.0 Statement Evaluation Criteria

The HTA intends to negotiate satisfactory contractual terms with the firm providing the highest ranked qualifications. The Statement of Qualifications will be evaluated according to the following criteria:

Responsiveness to RFQ	<ul style="list-style-type: none">• Completeness• Thoroughness	20 points
Knowledge and Expertise	<ul style="list-style-type: none">• Key Personal/Project Team• Experience with Similar Projects• Familiarity with Hawaii's Tourism Product• Technical Suitability	50 points
Project Understanding	<ul style="list-style-type: none">• Knowledge of Methods Used to Complete Project• Understanding of Project Specifications• Work Plan	30 points
Total Points		100 points

8.0 Notice to Proceed

Prior to the commencement of work, the HTA and the highest ranked selected firm will meet to negotiate the final terms of the contract. The selected firm shall be required to obtain a current tax clearance certificate from the State of Hawaii Department of Taxation and the Internal Revenue Service prior to entering into a contract with the HTA and again to receive final payment. Upon completion of the negotiation of satisfactory terms and conditions, the delivery of a fully executed contract between the contractor and the HTA shall constitute a notice to proceed.

9.0 Miscellaneous

- 9.1 This project and the execution of any contract shall be subject to the availability of funds and final approval from required government entities to enter into such contracts.
- 9.2 Upon the execution of a contract, the firm's Statement of Qualification and the contract may be deemed a public document and available for public inspection. Unless the specific information has been identified as being proprietary and the

disclosure of such information would adversely affect the business interest of the firm, all information in the Statement will be available for public inspection.

ATTACHMENT 1

HAWAII TOURISM PRODUCT ASSESSMENT STUDY BY TOPIC AREAS

TOPIC	REQUIRED ACTION	ADDITIONAL COMMENTS/GUIDELINES
Product Analysis		
Internal Environment Analysis <ul style="list-style-type: none"> • Major industry trends • Government actions (impact of military policies) • Political issues (budget deficit) • Macro-economic issues • Socio-demographic trends • Resident attitudes • Time-share; large resort management changes • Change of property owners • Cruise ship developments • Investment and capital resources • Pricing, affordability • Regulatory environment 	Critical major update	Include resident attitude information from Sustainable Tourism Study.
Infrastructure Analysis <ul style="list-style-type: none"> • Streets, roads, highways • Sewer; Water • Utilities (phone, cable, electrical) • Fire, police, medical, emergency • Technology connections 	Update	County studies and sustainable tourism studies may have some information. Need to assess advocacy role.
Transportation Analysis <ul style="list-style-type: none"> • Harbors; Highways; Airports • Service providers (cabs, motorcoaches, The Bus, rental cars) 	Update	Primarily DOT issues. Need to assess advocacy role.
Other Visitor Plant Analysis	Update	Consider planned Major Festivals survey.

TOPIC	REQUIRED ACTION	ADDITIONAL COMMENTS/GUIDELINES
<ul style="list-style-type: none"> Hotels, condos, timeshares and other accommodations Restaurants and other food service Retail operations Attractions (paid and non-paid) Cultural resources Activities, special events, major festivals, product enrichment programs Other entertainment Other visitor support services including greetings and visitor aloha program 		Include performance trends for the past 5 – 10 years (occupancy, average rate, sales tax receipts, TAT collected, etc.).
Natural Resources Analysis <ul style="list-style-type: none"> Natural environment (beaches, parks, trails, historic sites, scenery, climate) Alien species and visitor impact issues 	Update	Consider Natural Environment Assessment planned for this year via proviso
Visitor Satisfaction Analysis <ul style="list-style-type: none"> Other issues affecting satisfaction/experience e.g., hospitality, quality of service, language skills, cultural experiences, expectations Human resource issues 	Update	Review exit interviews at airports; HTA's planned accountability study and sustainable tourism study for possible information
SWOT Analysis <ul style="list-style-type: none"> Of complete product – Hawaii as a destination 	Update	Include age of infrastructure; qualitative information on attractions; and analyze all in relation to how the status affects our ability to be competitive. Put in perspective of customer.